

## CHAPTER 8

### TRIO / GEAR UP

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#### TRIO/SNG AWARDS

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The SNG program permits the award of grants to students who are deemed educationally disadvantaged. The HECB awards SNG to a number of students who have completed specific TRIO early awareness and support service programs. TRIO programs are designed to help students overcome class, social and cultural barriers to higher education. Typical financial aid programs primarily focus on financial barriers only. The HECB annually updates the list of TRIO eligible students and reserves funds for this purpose.

Schools are asked to disburse TRIO awards in the following order of priority:

1. GEAR UP, NEISP
2. Upward Bound
3. Talent Search
4. Other TRIO or early intervention program (Student Support Services, Educational Opportunity Centers, etc.)

**The TRIO award is a substitute for the regular SNG award.** It is not a separate scholarship. These students may not receive dependent care allowance or the traditional State Need Grant award during the academic year. However, if enrolled and eligible, these students may receive a traditional SNG amount during a fourth quarter or third semester of enrollment.

#### Eligible Students

The HECB compiles a list of TRIO eligible students. This list is available in the secure, password-protected portion of the HECB Website at:

<https://fortress.wa.gov/hecb/secure/login.asp>.

The category-four list shall no longer contain the names of graduates of other TRIO programs such as Student Support Services. However, schools may continue to give a TRIO award to a graduate of one of the other TRIO programs if the student was a TRIO recipient in the 2005-2006 year.

**No Income Test**

The eligible TRIO student need not meet the income cutoff limits of the regular SNG program although the aid administrator should be confident that the award is going to a student with high need. If the aid administrator is uncomfortable making the award to an individual student, the administrator is encouraged to discuss the case with SNG staff at the HECB.

**Award Amount and  
Separate  
Reconciliation**

A separate limited reserve for awards to eligible TRIO students will be made to each institution. The award amount for 2006-2007 is \$4,050 or SNG sector award amount, whichever is higher. This amount equates to the PELL Grant amount established by the Department of Education. Individual awards are to be prorated to reflect the student's rate of enrollment. Students must be enrolled at least half-time and the award may not exceed their overall need. There is also a fifteen-quarter limit. Schools must track and reconcile expenditures separately for TRIO students.

The amount of funding reserved for TRIO awards is being reduced as the need to maintain the state match for the federal GEAR UP program is reduced. In 2006-2007, the amount reserved for TRIO awards is reduced to \$250,000.

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**TRIO PAYMENT  
REQUESTS**

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Students recognized as graduates of a TRIO program are eligible for special awards during the regular nine-month academic year.

**Public Institutions**

To request TRIO funds, public institutions must submit a roster of recipients. This list must provide 1) student name, 2) social security number, 3) the amount of the term award, 4) term code, 5) enrollment status, and 6) an indicator for supplemental awards. A record layout for schools submitting text files is at the end of this chapter.

**Private Institutions**

Schools will identify this as a TRIO grant in the appropriate screen of the Request Utility program.

NOTE: The amount of state monies available for TRIO awards will be declining over the next few years. The level of TRIO funding is based upon the amount that the federal government requires as the state's contribution for participation in the GEAR UP program. The amount provided for GEAR UP scholarships has grown significantly over the years thus reducing the amount available in the form of a state match for TRIO/SNG awards.

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**TRIO  
RECONCILIATION  
OF RECORDS**

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TRIO records must be reconciled annually. The reconciliation report shall be available for the institution to download from the secure website at least two weeks before it is due. The due date is July 9. If there are discrepancies between the institutional records, the aid administrator must advise the HECB accordingly.

**Year-End Reporting**

The summary report sent out by the HECB represents an end-of-the-year final reconciliation.

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**GEAR UP  
SCHOLARSHIP**

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GEAR UP is a separate scholarship; it is not a SNG. A student may receive both the GEAR UP Scholarship and a SNG at the same school for the same academic term. Scholarship awards are to be prorated to reflect the student's rate of enrollment.

**Eligible Students**

The list of eligible GEAR UP Scholarship recipients is posted to the secured password-protected portion of the HECB's Website:

<https://fortress.wa.gov/hecb/secure/login.asp>.

The GEAR UP scholarship is separate from the SNG, and funds are handled through the HECB's GEAR UP program staff. Questions regarding the GEAR UP program should be directed to (360) 753-7834 or (360) 753-7837.

# Washington State Need Grant Program

## TRIO/SNG REQUEST FORM

*FY 2006-2007*

**Institution**  
**Name:** \_\_\_\_\_

Code: \_\_\_\_\_ Page: \_\_\_\_\_

[illegible]

**Total TRIO Amount Requested:** \$0.00 **# of Payments:** 0

**HECB/SNG 2006-2007**

54

**WASHINGTON TRIO/STATE NEED GRANT PROGRAM  
YEAR-END RECONCILIATION OF RECORDS  
FY 2006-2007**

**PUBLIC INSTITUTIONS  
DUE DATE: JULY 9, 2007**

Institution Name: \_\_\_\_\_

Code: \_\_\_\_\_

1. What is the total TRIO dollar amount received from the Higher Education Coordinating Board for 2006-2007?

\$ \_\_\_\_\_ -

2. What is the total TRIO amount your institution expended for the 2006-2007 school year? (Report attached.)

\$ \_\_\_\_\_ -

3. Amount to be refunded to HECB (by EFT, IAP or check payable to the "State of Washington"), or

\$ \_\_\_\_\_ -

\_\_\_\_\_  
Signature of Financial Aid Administrator

\_\_\_\_\_  
Date

